Helix Practice Manager

Ad Hoc Report Builder 3

User Manual

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Introduction

This document is a guide to using the Ad Hoc reporting tool that is now being provided with Helix Practice Manager.
Reporting Services are being used to provide a set of standard reports and a report builder is also available that will allow the user to create their own customised reports.
The report builder is based on drag and drop. The user will have a set of fields available to them (from various database tables) and will be able to use these fields and create filters against them to create whatever type of report they require.
A user will not need to be a technical user but some technical knowledge will be required as to the nature of using logical statements (i.e. 'and', 'or' logic).

Default Reports

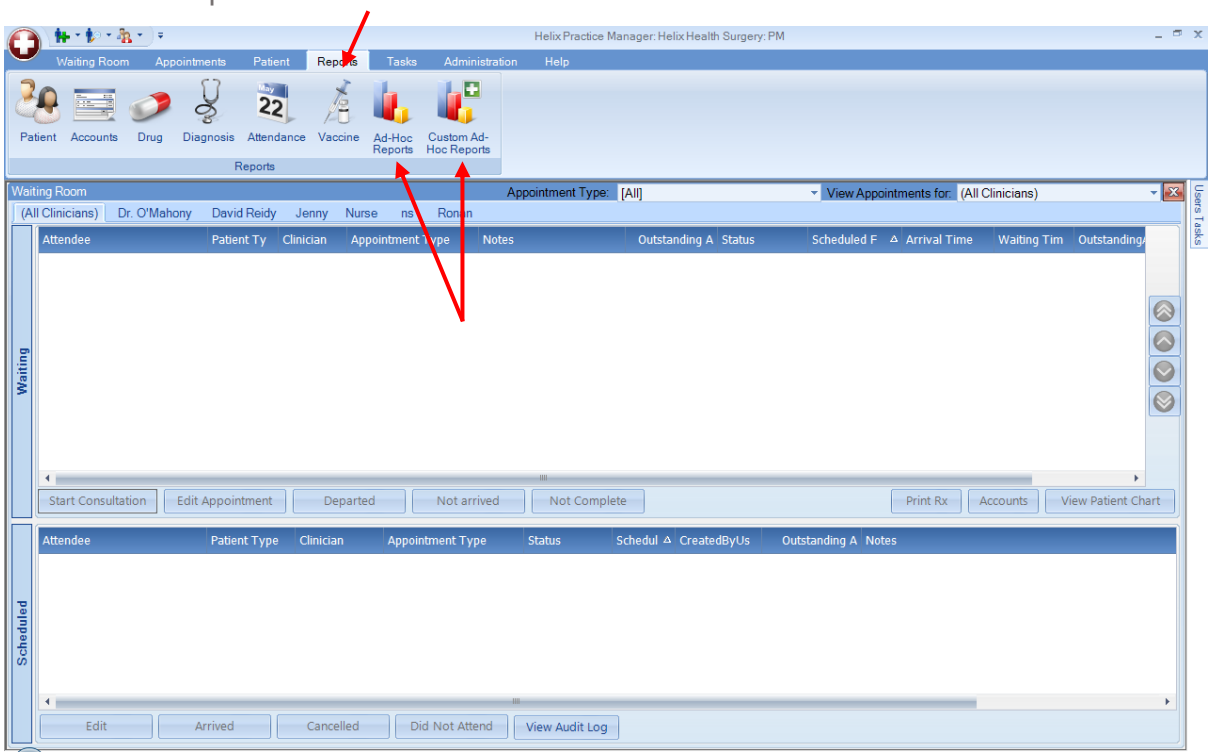
HPM comes with a standard list of Adhoc reports already set up which can be used when and if required. The reports are divided into modules which relate to each area of HPM:

- Appointments
- Patients
- Consultations
- Medication
- Medical History
- Immunisations
- Exams
- Protocols
- Documents
- Accounts
- Tasks

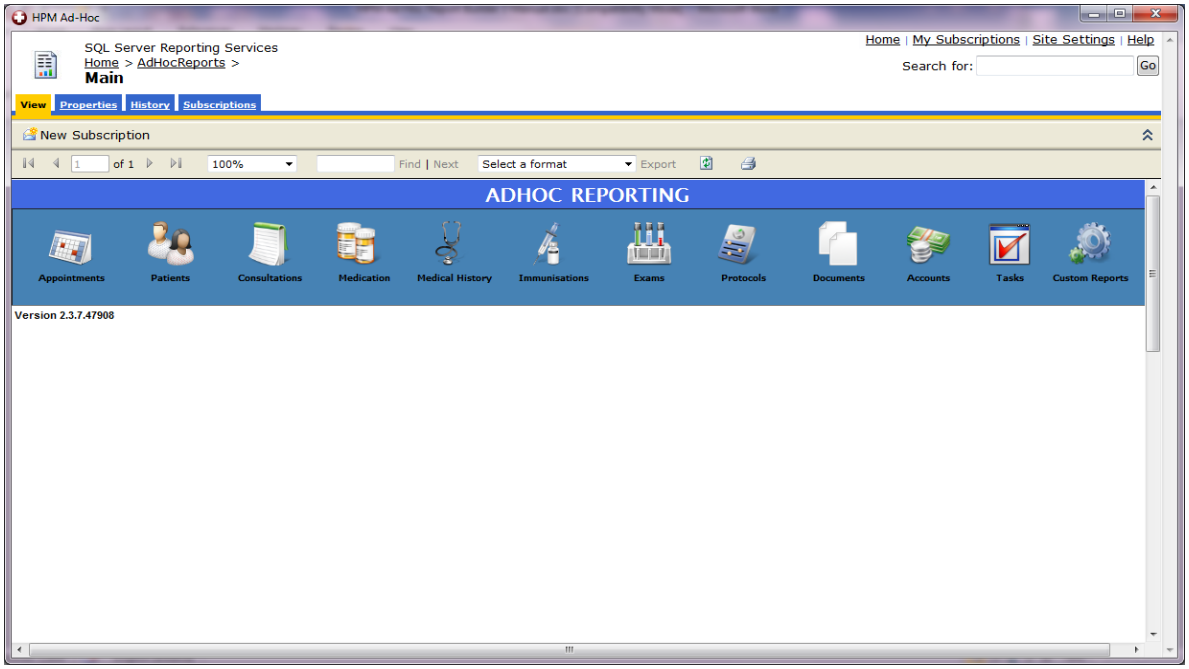
Running Existing Reports

To access the Adhoc Reports, click on the Reports tab in HPM. There are two options here for Adhoc reports:

- Ad-Hoc Reports – Click here to access the standard pre built Ad-hoc Reports
- Custom Ad-Hoc Reports – Click here to create custom reports or to access custom made reports.

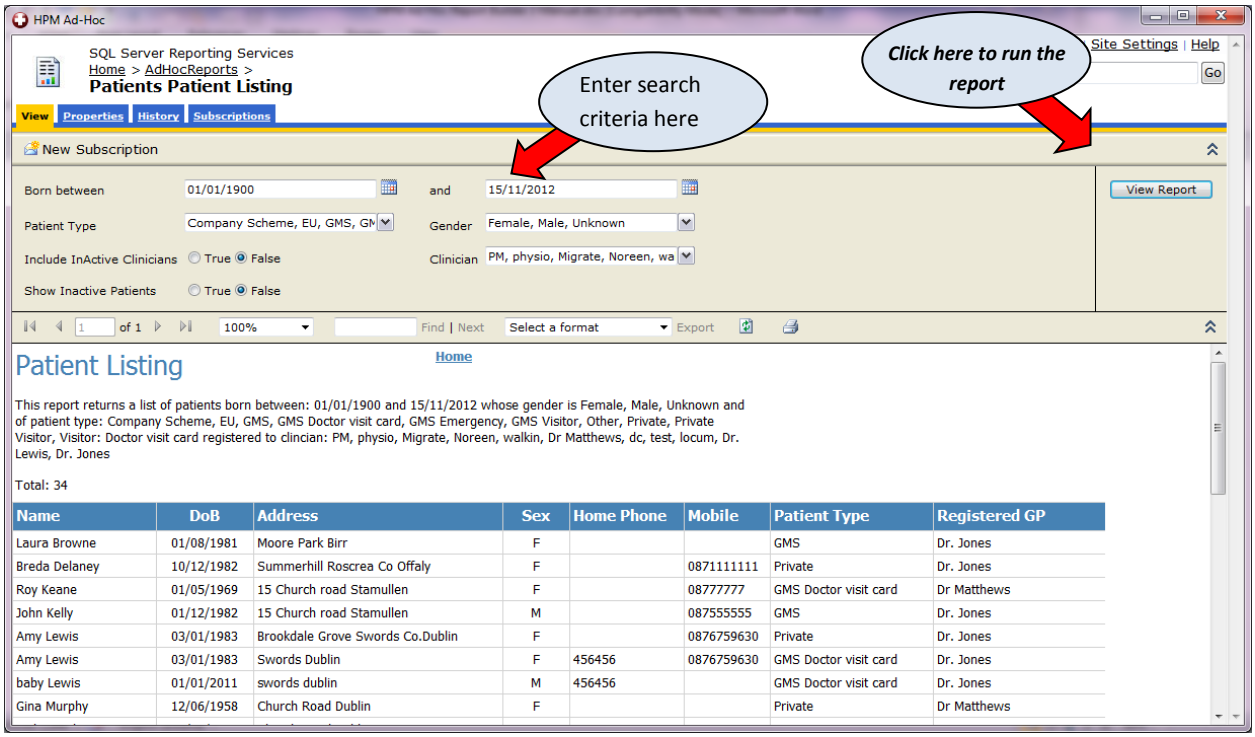


When Ad hoc reports are launched, the user will see a tab for each of the modules available to report on:



To run an existing report click on the section of the system you want to report on, a list of available reports will open.

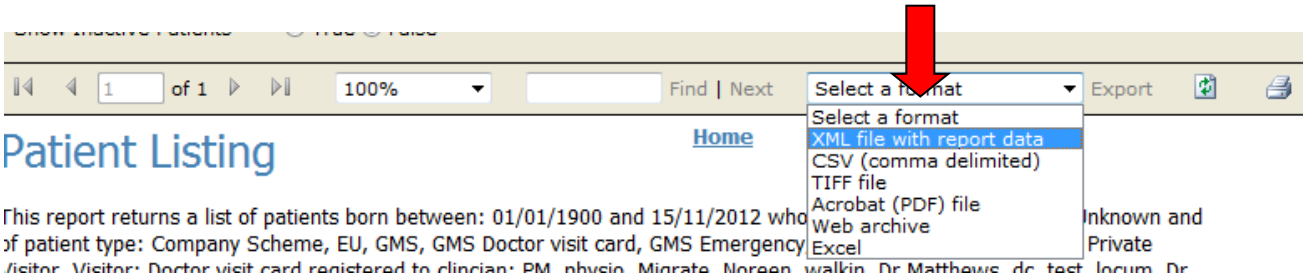
Click on the report you wish to run, and then enter the search criteria of the report. If there are filters on this report, they will appear at the top of the screen. Click View Report to run the report.



Name	DoB	Address	Sex	Home Phone	Mobile	Patient Type	Registered GP
Laura Browne	01/08/1981	Moore Park Birr	F			GMS	Dr. Jones
Breda Delaney	10/12/1982	Summerhill Roscrea Co Offaly	F		0871111111	Private	Dr. Jones
Roy Keane	01/05/1969	15 Church road Stamullen	F		08777777	GMS Doctor visit card	Dr Matthews
John Kelly	01/12/1982	15 Church road Stamullen	M		087555555	GMS	Dr. Jones
Amy Lewis	03/01/1983	Brookdale Grove Swords Co.Dublin	F		0876759630	Private	Dr. Jones
Amy Lewis	03/01/1983	Swords Dublin	F	456456	0876759630	GMS Doctor visit card	Dr. Jones
baby Lewis	01/01/2011	swords dublin	M	456456		GMS Doctor visit card	Dr. Jones
Gina Murphy	12/06/1958	Church Road Dublin	F			Private	Dr Matthews

Once the report has been run, there are several options available:

- **Pages:** use the left and right arrow icons to view reports longer than one page
- **Zoom**: Click on the Zoom drop down to zoom in or out of the report
- **Find Text:** type a keyword into the search text box and click Find/Next to search for results in the report.
- **Export:** The user can export the report by select the required format from the drop down list and clicking Export. Reports can be exported into the following formats: XML, CSV, TIFF, PDF, Web Archive, Excel
- **Print Report**: click on the printer icon to print the report



Creating New Reports

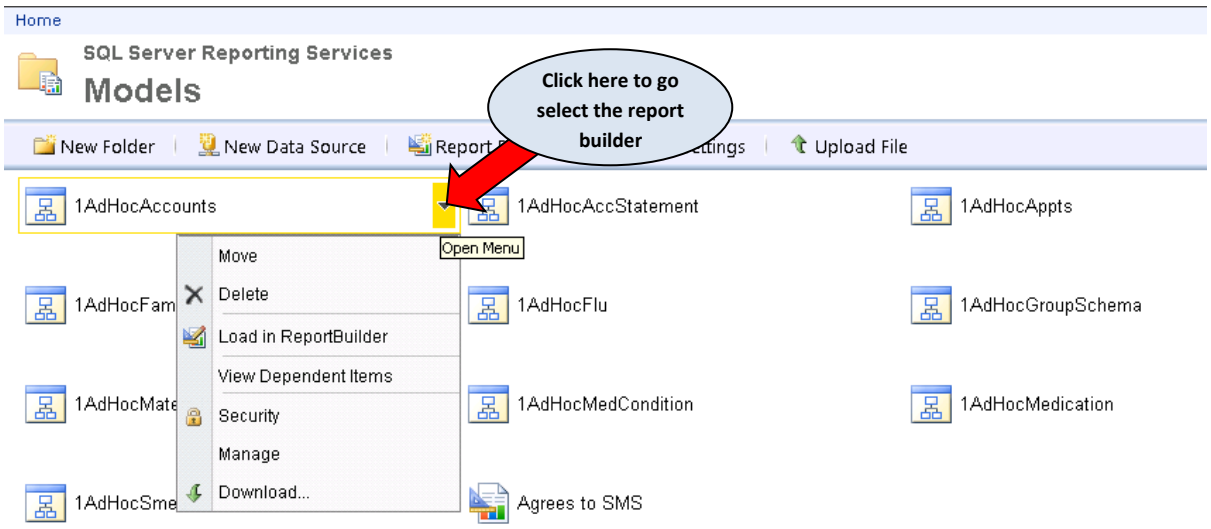
In order for the user to create their own reports they need to load the report builder. To access the report builder navigate to 'Models' folder.

Step 1 - Selecting the Module

The user must firstly choose the data source that they wish to use. The data sources available correspond to the different areas of the system that can be reported on. As more default reports are created and more customer requests are received this area will grow. At the moment, reporting can be done in the following areas:

- Accounts
- Attendance
- Consultations
- Family Planning
- Flu Vaccine
- HeartWatch
- Immunisations
- Maternity
- Medical Conditions
- Medications
- Patients
- Recalls
- Cervical Smears

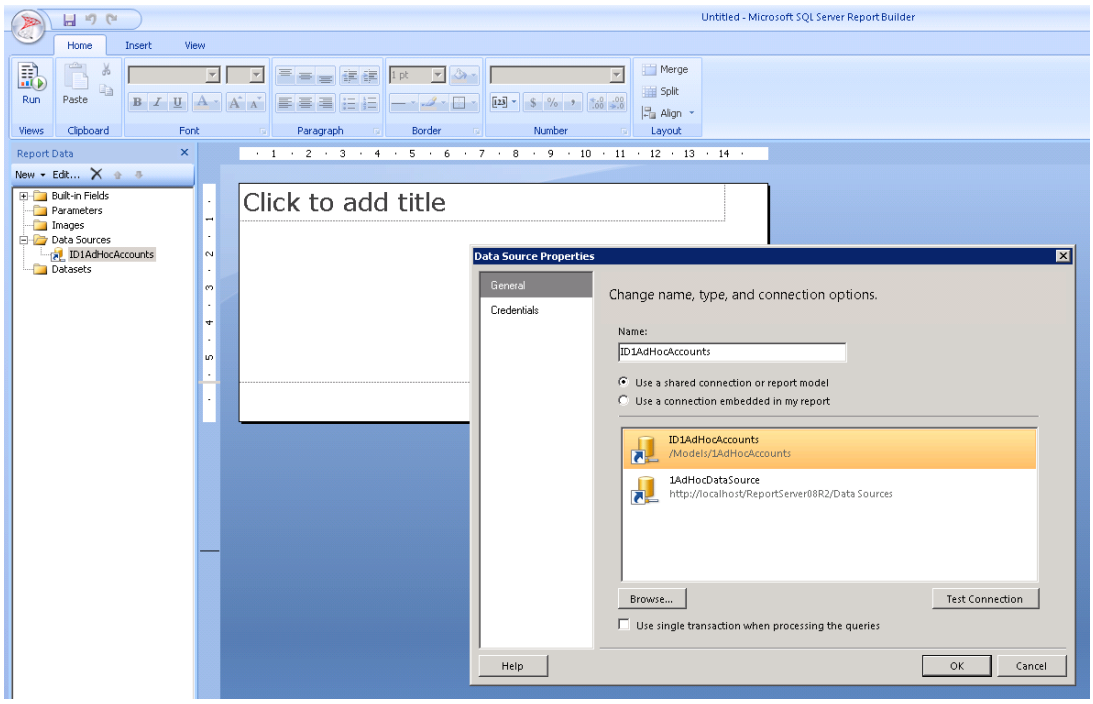
From the 'Models' folder place the cursor over the model required as a data source for the report. Click on the down arrow which appears to the right and from the list select 'Load in Report Builder'.

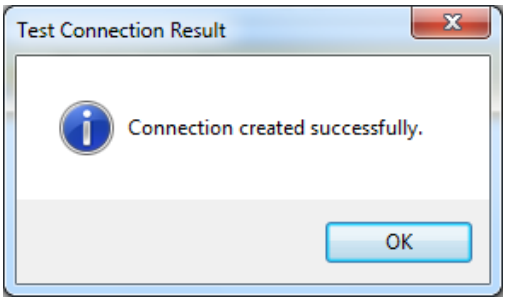


Step 2 – Configuring your data source in Report Builder

Once Report Builder has started expand the 'Data Sources' folder on the left of the screen by clicking on the plus sign to the left, then Right-click on the data source e.g. "Adhocaccounts" and select 'Data Source Properties'.

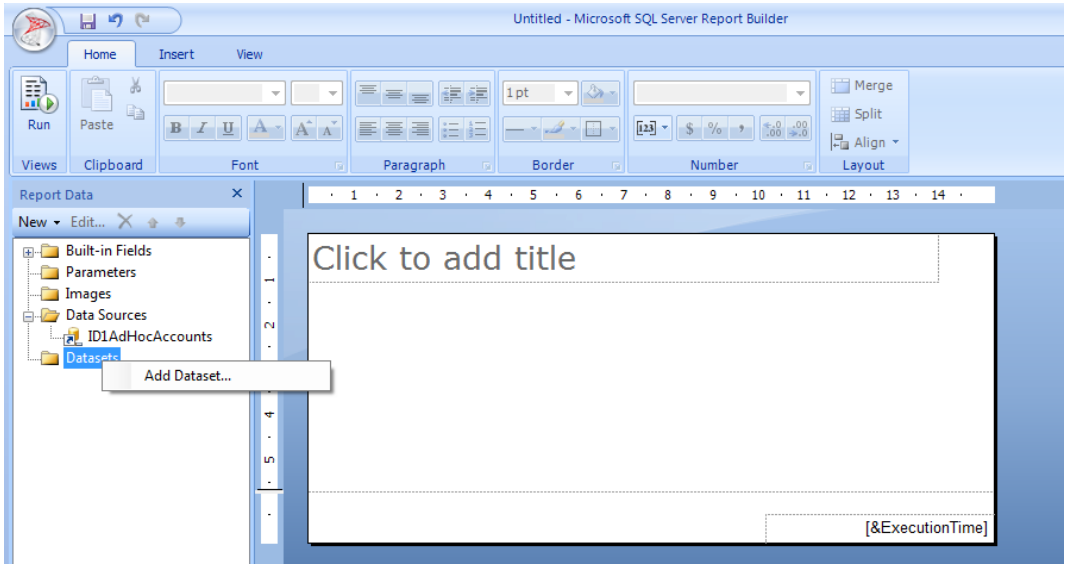
The Data Source Properties box will appear and from this, select the data source required and click on the 'Test Connection' button to make sure a connection to the source can be made. A message will appear confirming that a connection was created successfully, click on the 'OK' button to continue.



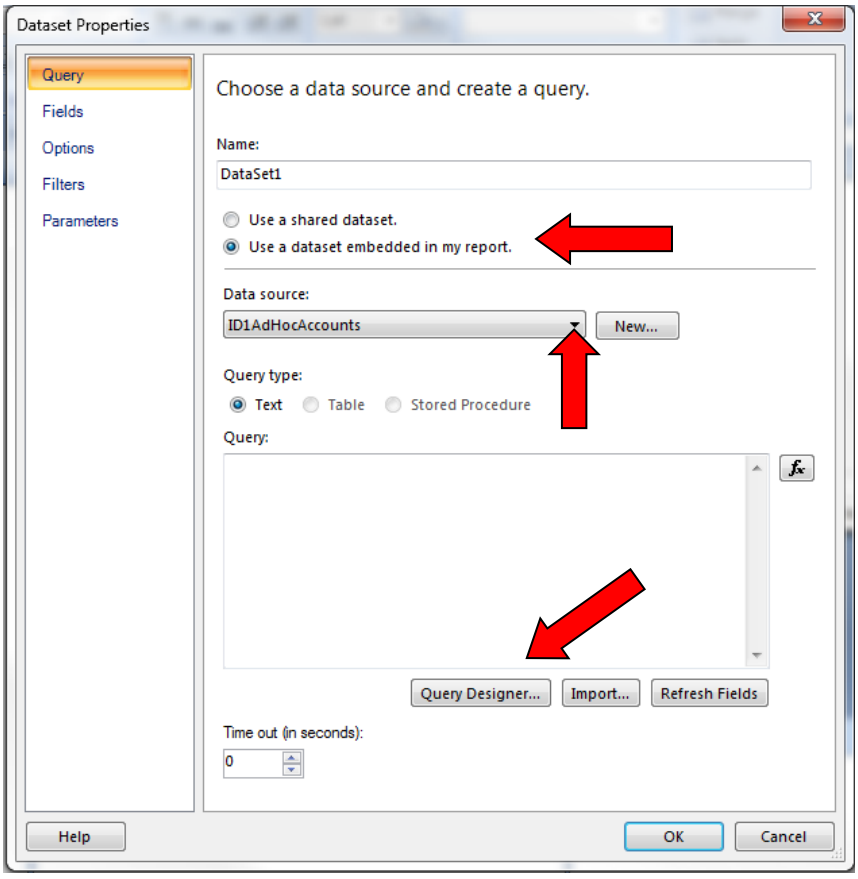


Step 3 - Creating a Data Set

From the Report Data tree, right click on Datasets and select 'Add Dataset'.



On this screen from the Dataset properties form select 'Use a dataset embedded in my report'. Then select the data source from the drop down (it should be the one just created from the model) and click on the 'Query Designer…' button to create your query.



Step 4 – Adding Content

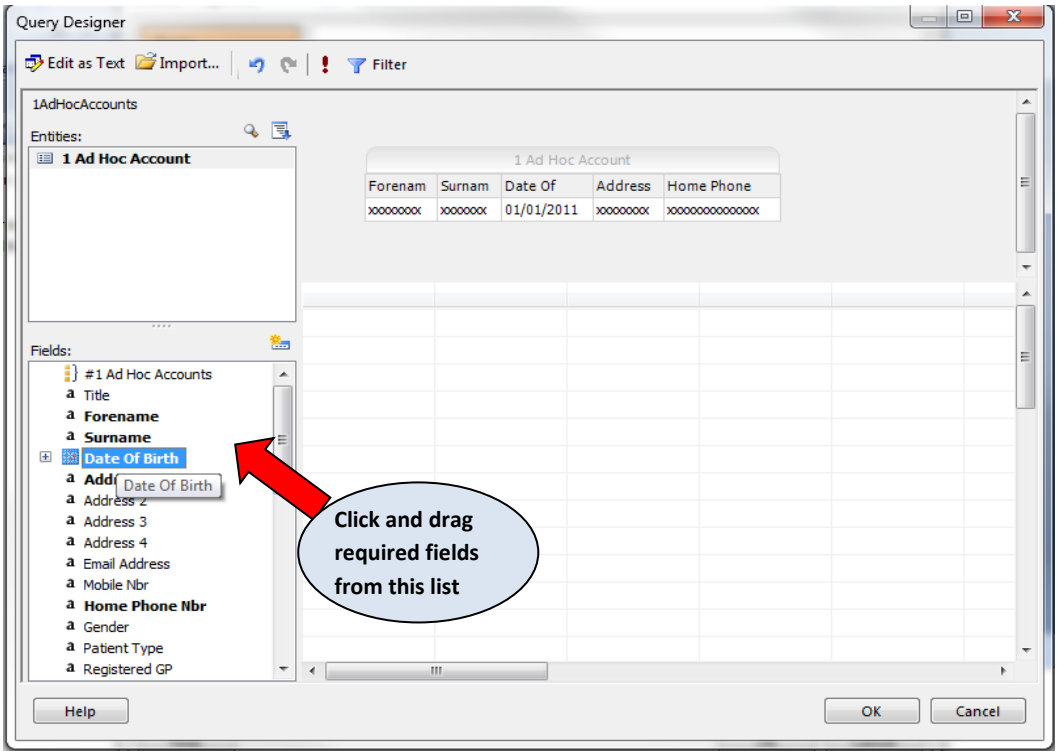
The user can now begin creating their custom report.

Adding fields to display on report

The user can drag any fields from the left hand side and drop them into the top box on the right hand side on the main form. When dragging and dropping in fields, drag the cursor onto the report and drop when the blue line appears beside the column name where the field is required.

The user can also double-click on a field to put it on the report.

The list of fields available will depend on the module selected in step one.

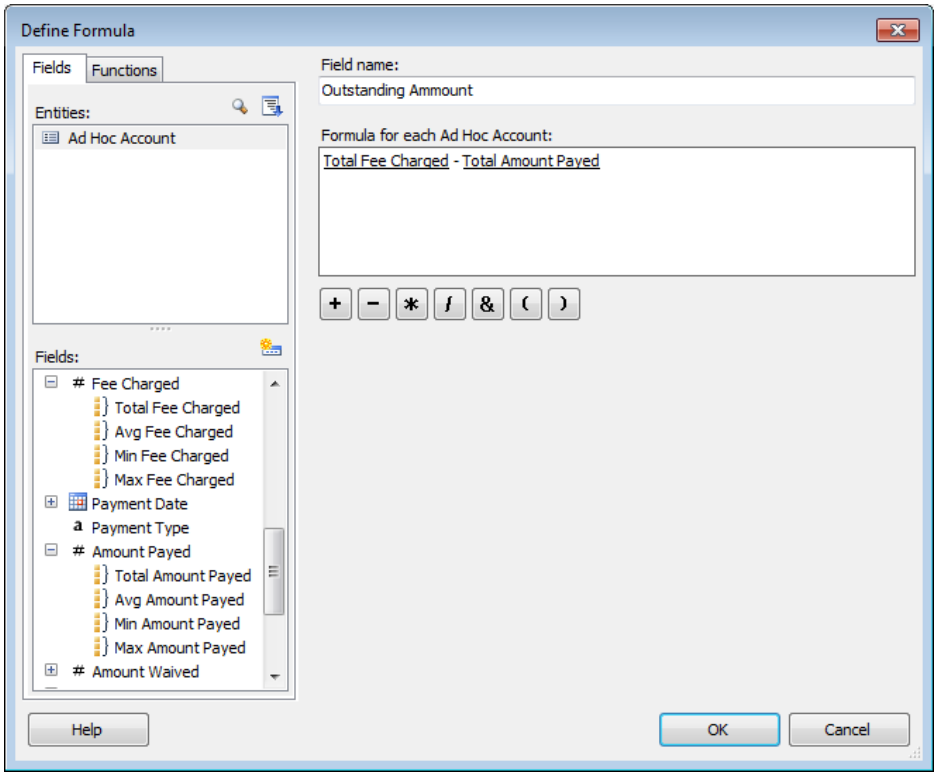


Creating New Fields

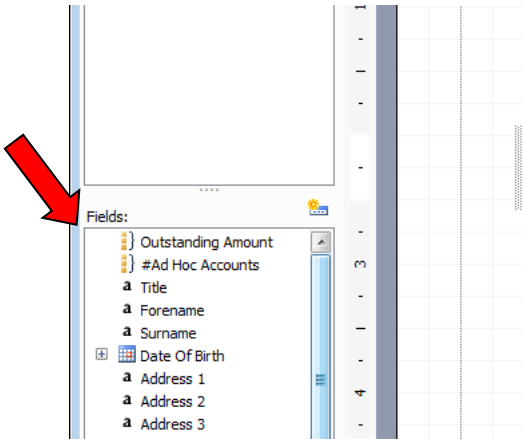
The user can also create fields using the 'New Field' option. This option can be found at the top of the list of available fields.

New fields can be created using one or more of the existing available fields.

For example when doing accounts reports, there is a field for amount charged and one for amount paid, to calculate the total amount outstanding on a bill, this could be found by taking one amount away from the other.

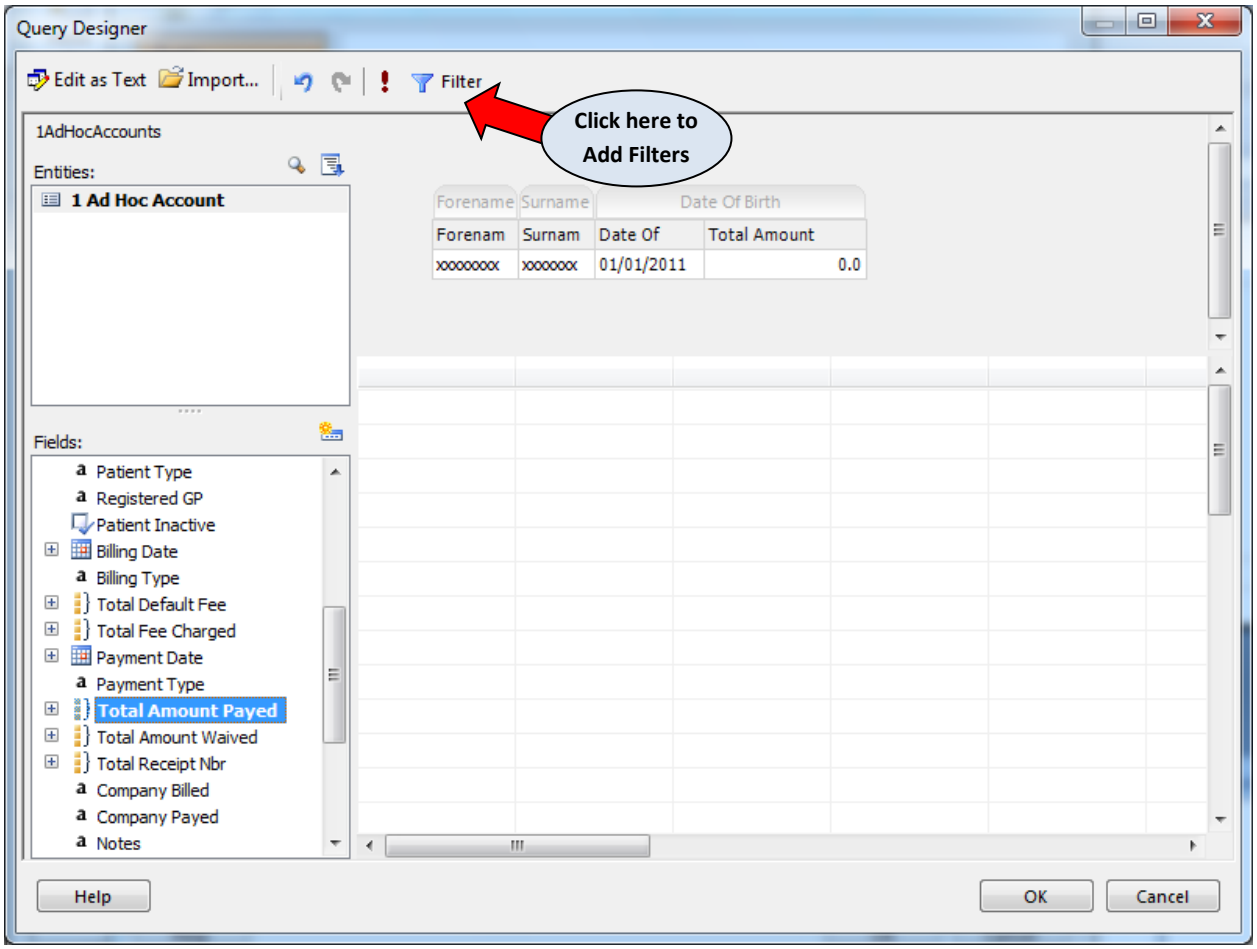


In this example shown above, select the total Fee charged, then click on the Minus symbol then select the Total Amount Paid. Name the field Outstanding Amount. Click OK to save and this new field will appear at the top of the list of existing fields.



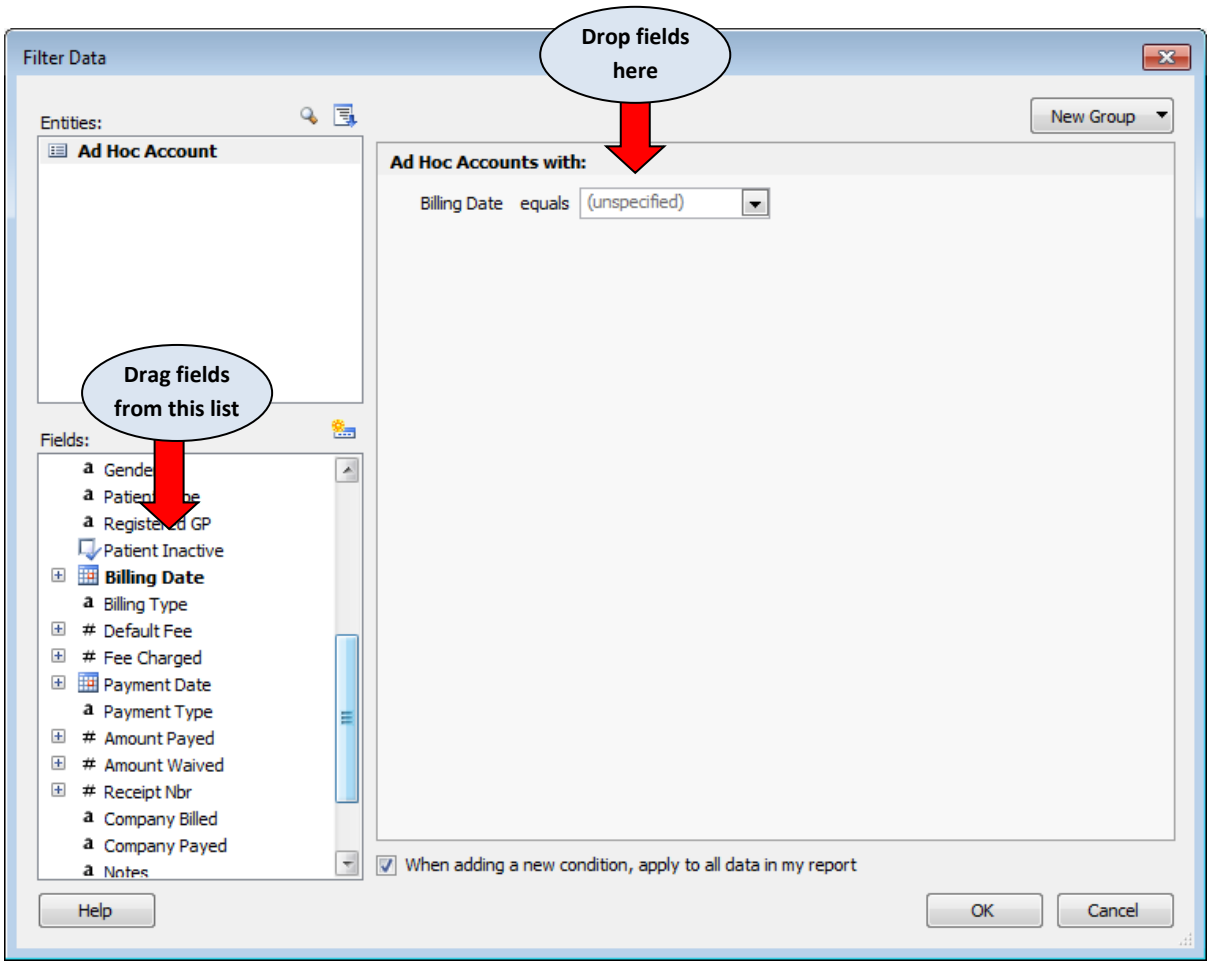
Adding Filters

The filter option can be used to add fields to filter the data, to specifically target the data required.

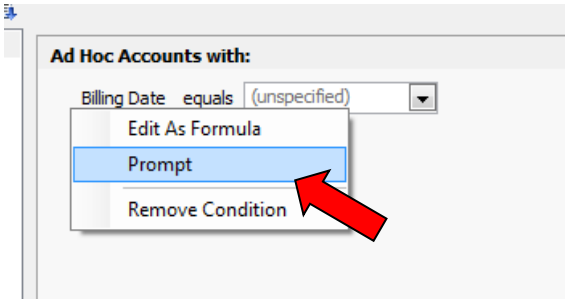


Filters are used to narrow down your reports by making different selections. Commonly used filters include dates, types (billing types, appointment types, medical conditions, etc) and figures (outstanding Fees, number of appointments, etc)

To add a filter, first select the field needed in the filter by double clicking on it or clicking and dragging it onto the main section.

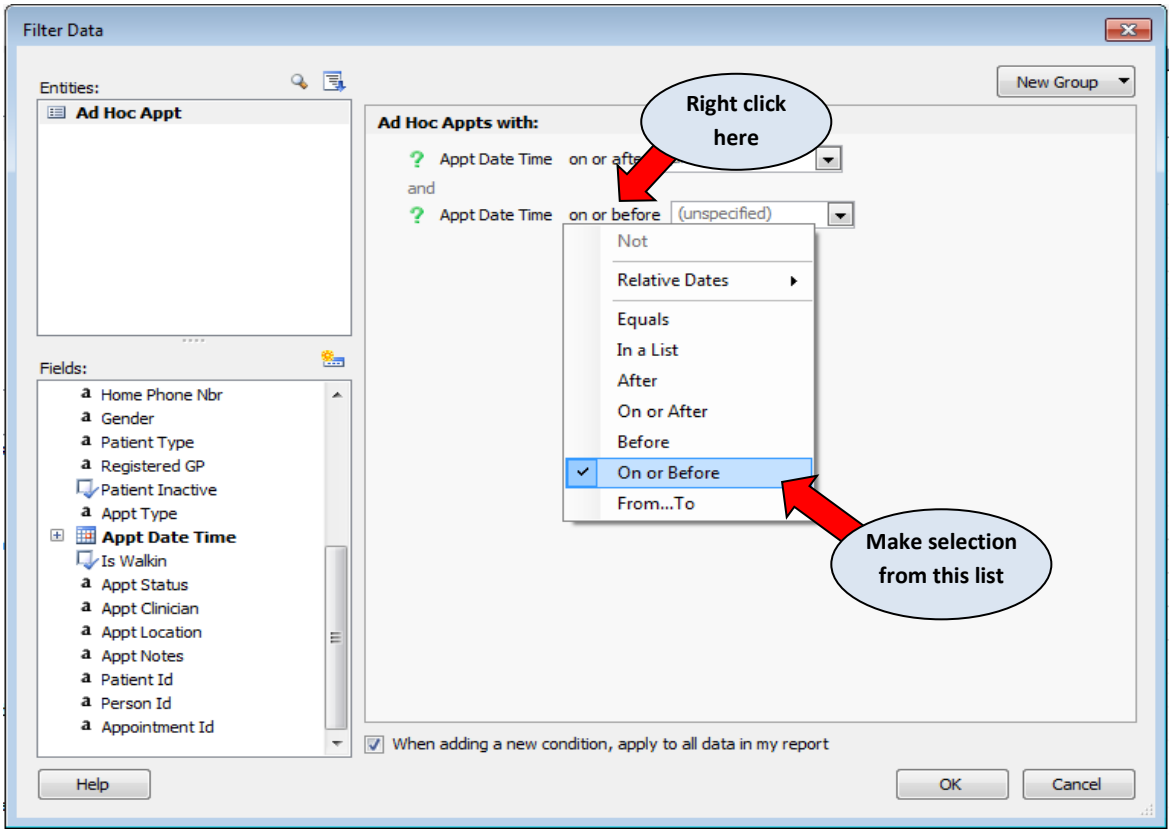


To make the field a prompt that will appear before the report runs, right click on the name of the field and select Prompt.



Right click on Equals to change the filter criteria further; there will be any number of the following options:

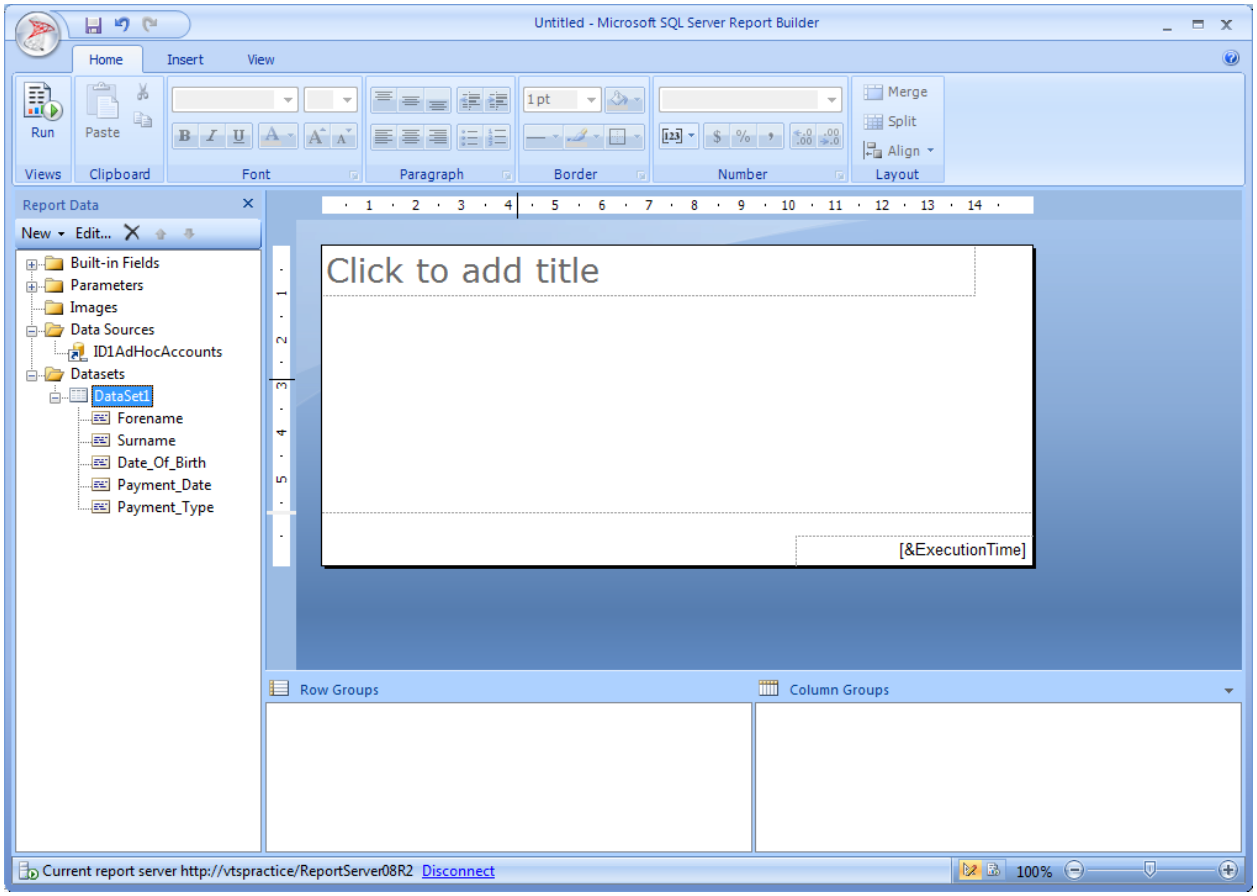
Condition	Explanation	Example
Not	Chosen field is NOT EQUAL to a specified value.	Where Billing Type NOT EQUALS Consultation
Relative Dates	Chosen field is in ➔ This Month, Quarter or Year ➔ Month to date, Quarter to date or year to date ➔ Last (n) (where n is a number of days, months, quarters or years). ➔ Next (n) (where n is a number of days, months, quarters or years). ➔ Same month last year ➔ Same quarter last year	Where Payment Time/Date IN SAME QUARTER LAST YEAR
Is Empty	Chosen field is empty or contains no value.	Where patient PPSN IS EMPTY
Equals	Chosen field is equals to a specified value	
In a list	Chosen field is a list of values and the user can select one or more of these.	
After	Chosen field is after a specified value.	
On or After	Chosen field is on or after a specified value.	
Before	Chosen field is before a specified value.	
Contains	Chosen field contains the specified value or text in any part of the value.	Medical Condition Contains “Asthma” - This will find all medical conditions containing the word asthma.



Step 5 – Designing the Report in Report Builder

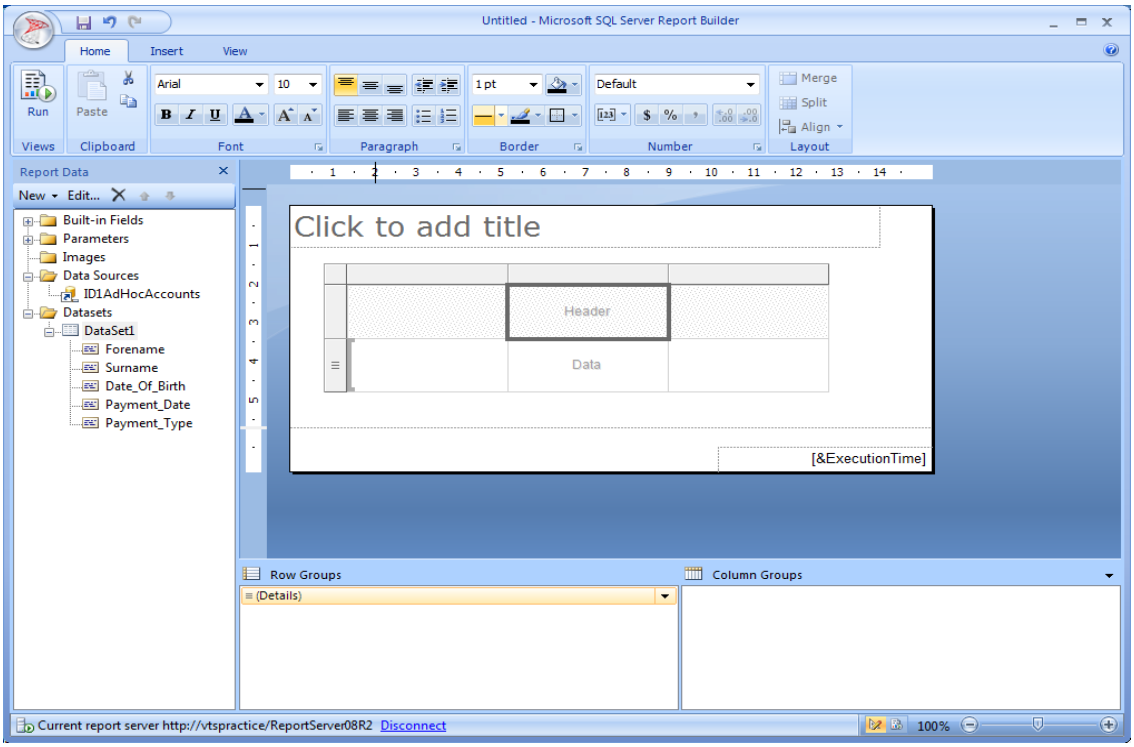
Once the Data Source and Data Set are created, the user can set about designing the layout of the report.

The fields you have selected should be displayed on the left hand side of the screen.

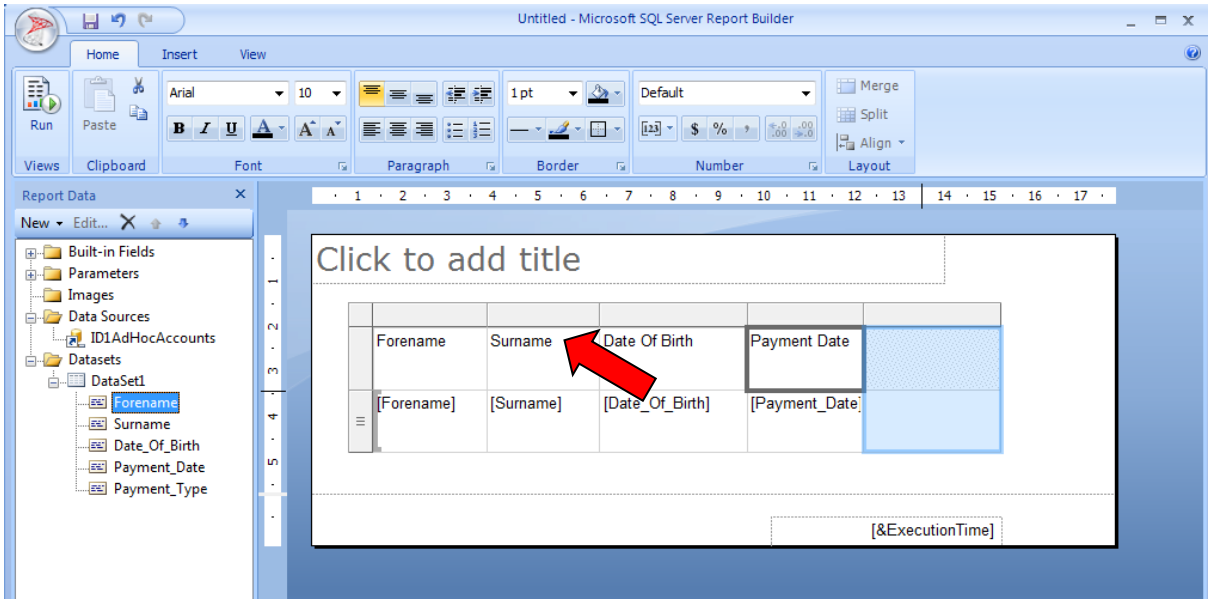


Returning the results in a table

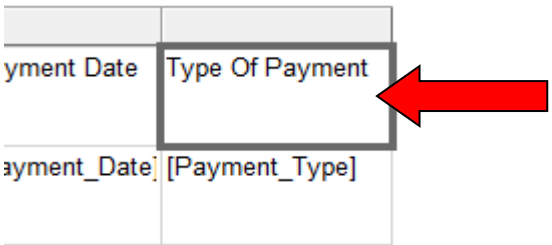
Click on the insert tab and click on Table and click on Insert Table, then move the mouse to the main report screen and click once this will put a table on to the page, the user can adjust the height and length of the table by dragging out the column widths.



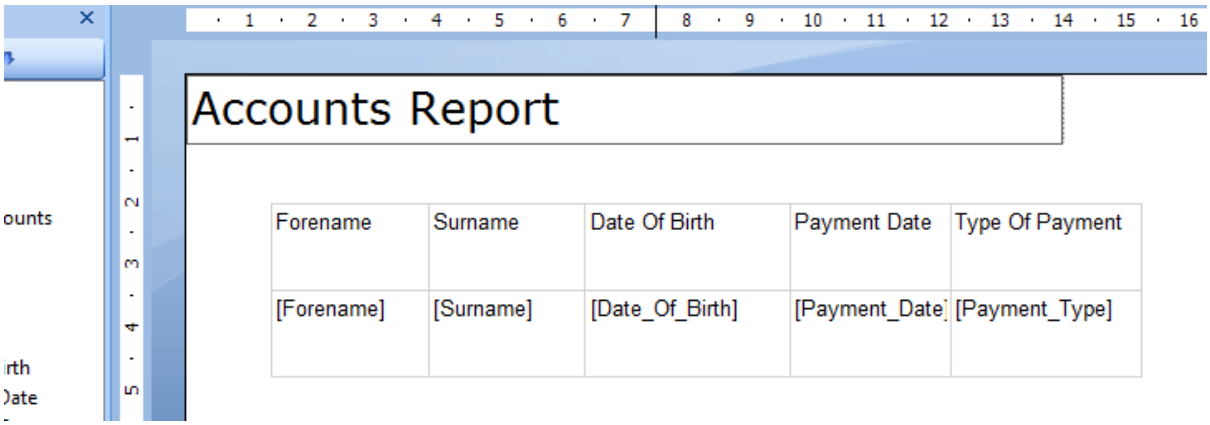
Then click on the data set fields on the right hand side and drag into the required column.



The user can edit the top row to if the heading is not correct



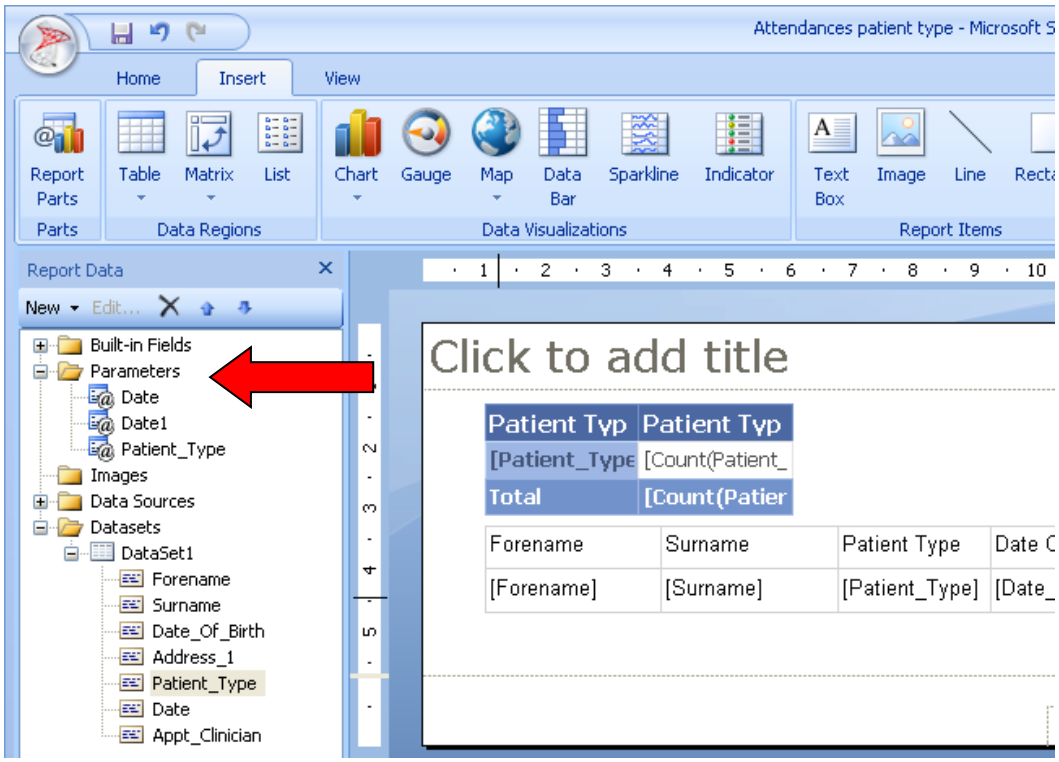
A title can be added to the main report also by click on "Click to Add title"



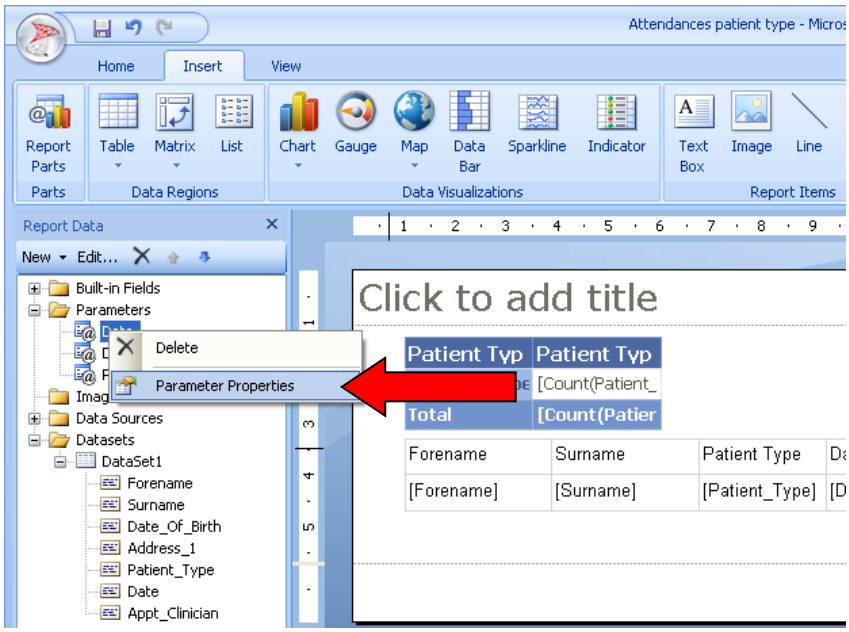
Date Parameters

If using date fields in the report as a filter, the user can make sure the correct format is being used in the report.

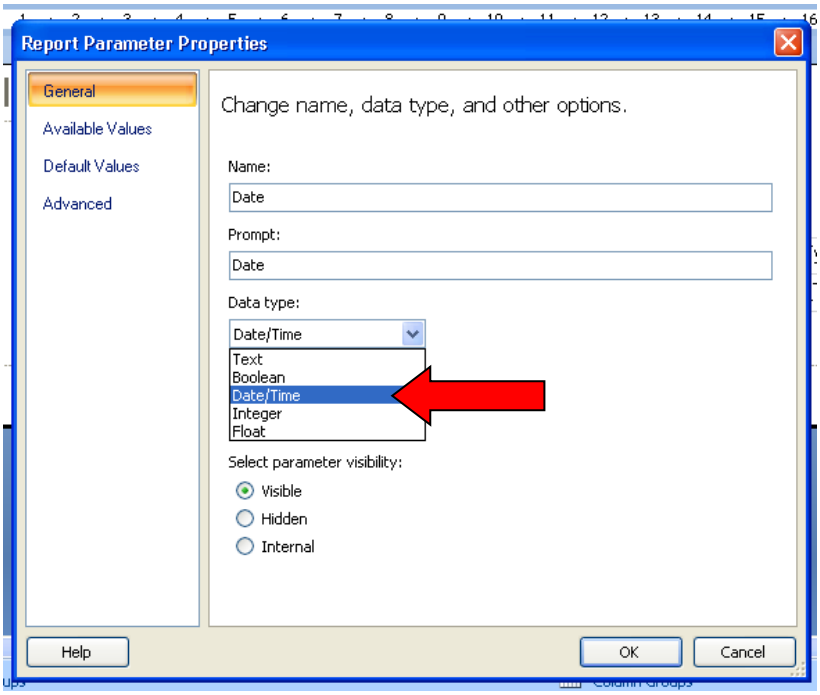
Select the Parameters folder on the left of the screen:



Then select the Date field, right click on this field and select Parameter properties:

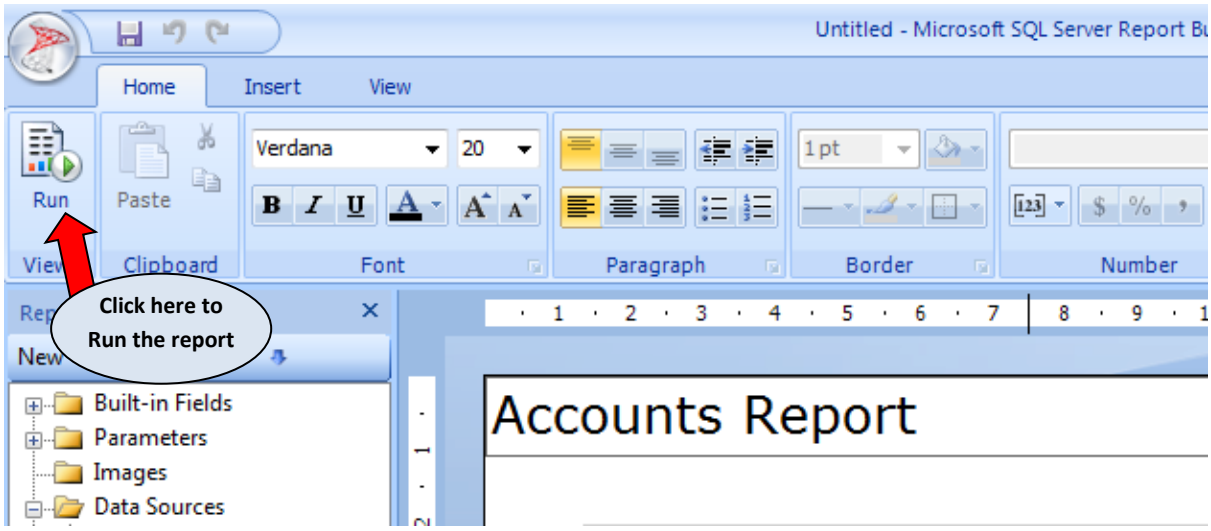


Click on the Data Type drop down and select Date/Time. Click OK to save, and repeat for any other date fields in the parameters section.

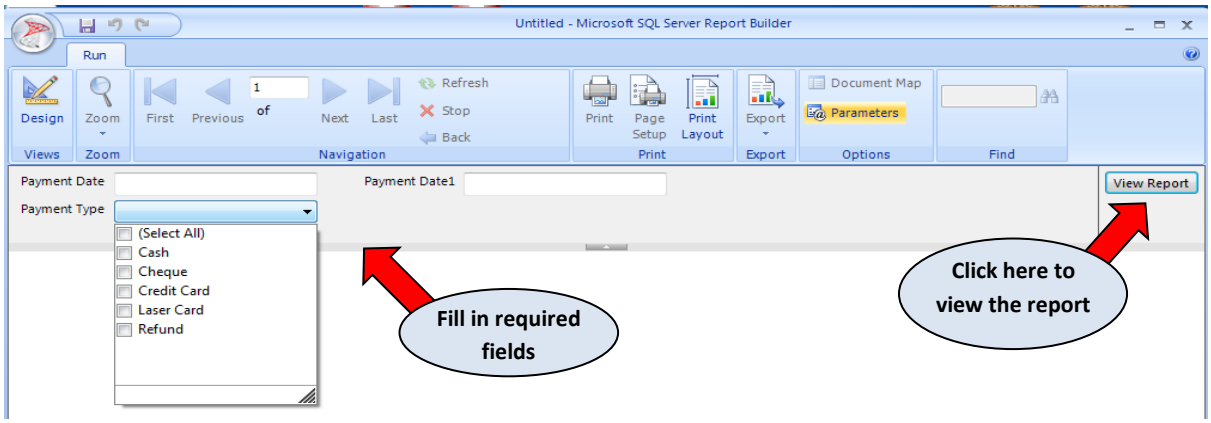


Step 6 – Viewing the Report

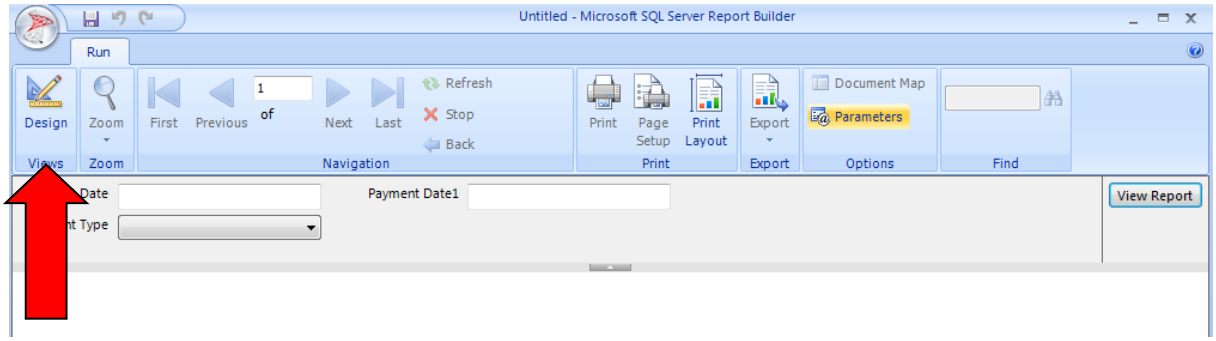
Once the report layout created is correct, the user can run it to check the output is as required.
At the top of the screen on the home tab click on Run.



If there are any prompts added at the filter stage, these will appear at the top of the screen. Run the report to make sure it is correct.

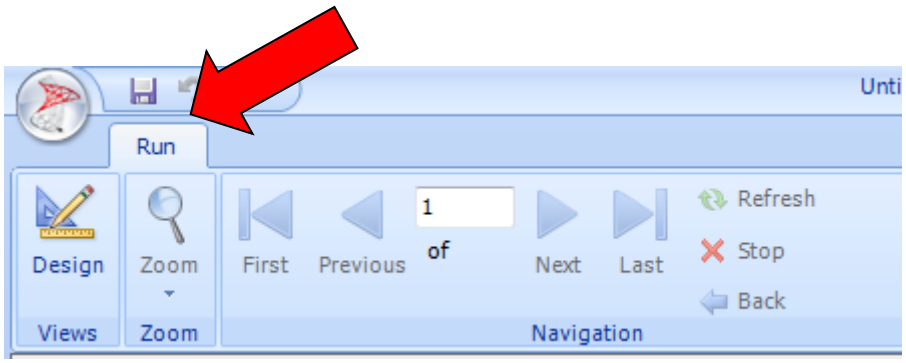


If the report is not correct at this stage, return to the report builder and make any required changes by clicking on Design at the top of the screen.

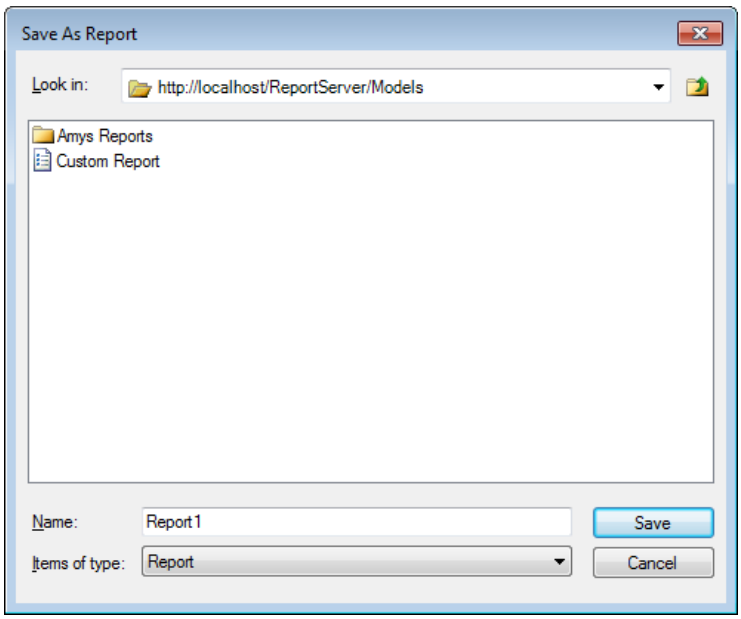


Step 7 – Saving the Report

Once the report is correct, it will need to be saved. Click on the save icon on the top left hand side of the screen in either the design or run mode.



This will open up a 'save as' dialog box. Type in the Name of the report and select a relevant folder to save the report in. This report will then appear in the folder it was saved in to be run as required in the future.



Saved reports can be accessed when the Custom Adhoc reports icon is opened from the Reports menu in HPM.